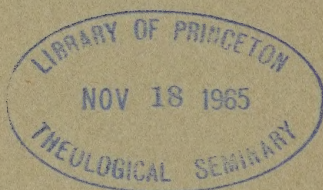


A Guide to the Care and
Administration of Manuscripts

Lucile M. Kane

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Confidential

Washington, Feb 14th, 1852

THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

Dear Sir,

I rec^d your letter in due course.

Duty has rec^d?

Mr. Fenton. He says F. owed him a small amt. some \$20 or \$30. nevertheless he will pay the amt. he has collected to the Commissioner of State. So you would do well to write him.

Strange to say, notwithstanding every effort I could make, the treaties were not yet before the Senate, although the Sec^y. of the Interior had informed me that they had been sent to the Pres^t. for transmission to the Senate. I remember a good one in cause of

A GUIDE TO THE CARE AND ADMINISTRATION OF MANUSCRIPTS

Lucile M. Kane

So I have them sent in without delay. He had not yet examined them would do so that day. Therefore after my departure, he sent for the Sec^y. of War and the Interior & the Comm^r., and had the whole matter over. The interview ended by his deciding to send them immediately. If they did not come yesterday, they will on Monday, when the fight will come on before the Senate. Have my misgivings, still I think the chances are in favor of ratification. But there is opposition to be encountered. Stewart formerly of Michigan, has the claims of old McRolette in his hands, he will of course do what he can to prejudice existing arrangements. Mr. Sanford, had an interview with both the Ewings, who shortly having any connection with Sweetser, but at any rate I think that in them, some arrangement may be made to keep S. quiet, even if

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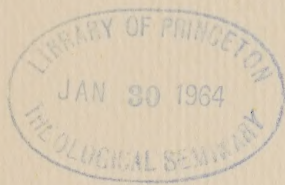
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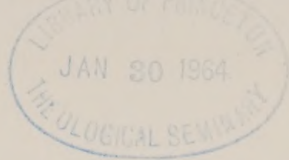
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of Manuscripts*

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A Guide to the Care and Administration of Manuscripts

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collecting and care of manuscripts, to write this technical monograph. The manuscript was read for suggestions by Dorothy V. Martin, curator of manuscripts of the Burton Historical Collection, since deceased, by Elizabeth R. Martin, librarian, and Bruce C. Harding, archivist, of the Ohio Historical Society, and by Esther Jerabek, chief cataloger of the Minnesota Historical Society, as well as by members of the council of the Association. Robert H. Bahmer, deputy archivist of the United States, furnished the author certain technical information. Kenneth W. Duckett, curator of manuscripts of the Ohio Historical Society, edited the manuscript for publication. William R. Greer of Sullivan and Speer, Inc., Minneapolis, a veteran newspaper and public relations man, read the manuscript. Marcella Beaulieu, document restorer at the Minnesota State Archives and Records Service, checked the section on lamination. Russell W. Fridley, director of the Minnesota Historical Society, allowed Miss Kane to use office time to complete the bulletin when off-duty hours proved insufficient. The pictures are included through the courtesy of William J. Barrow, the Library of Congress, and the National Archives.

One final word for the new curator of manuscripts: there are several ways to process manuscripts. Each repository should adopt those techniques which seem most appropriate to its resources. In this bulletin Miss Kane describes techniques and the principles behind them and offers a selected bibliography of writings for further study of the subject.

JAMES H. RODABAUGH
Columbus, Ohio

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Establishing the First Controls

Accessioning is the first step in controlling a collection when it arrives in a repository. This process consists of assigning a number to the collection, and recording its title, date of receipt, date of acknowledgment, the donor's name and address, approximate size, general subject matter, and comments on restrictions or transfers. If the collection has been purchased, the seller's name and the purchase price are included in the record. As soon as the catalog number or location symbol is known, it is added to the record. Accessioning data may be entered either in a book or on cards.

By the time a collection arrives, all important policies concerning its use, the discretionary rights of the repository in handling it, and publication rights should already have been defined in an agreement. If it has not been possible to make decisions without study of the papers, an effort should be made to examine them quickly and to formulate the agreement.

Letters exchanged with the donor upon or prior to receipt of the manuscripts or during the processing may aid in the solution of minor problems not foreseen, and guide the repository in the disposition of items weeded from the collection, release of information about it, and the possible transfer of some of the materials to other institutions. It is wise to seek from the donor information that will be useful in cataloging, such as the following: organization names,

family history, names of individuals and their dates of birth and death.

Letters exchanged with the donor form the nucleus of the "accession" or "case" file. The file may include correspondence with others concerning the collection, agreements, memoranda summarizing conversations, newspaper and magazine clippings, news releases, and accession notes. Well-kept accession files are useful both to searchers and staff. They document the origins and development of collections, preserve collecting lore, and record the collecting policies of the institution.

Recording the new collection in a "donor" or "source" file is an important part of the accessioning process. The name of the donor or seller and the accession number are entered on a card, which is then filed alphabetically. As an index to the accession register, the source file may show the relationship of segments of a collection presented by the same person at different times. It also provides a means of identifying quickly the gifts of an inquiring donor.

Repositories which receive annually hundreds of collections must devise systems for recording action on manuscripts that are not accepted. The Library of Congress uses a "daily record book" in which are entered the receipt and disposition of manuscripts that are rejected, as well as of those that are accepted. Other institutions file data on rejected manuscripts in folders arranged by the title of the collection, with cross-reference sheets bearing the names of the persons who offered the manuscripts.

If a representative of the repository is able to examine the collection and supervise its packing before it is shipped, controls can be introduced before it is moved. Particularly, the original filing arrangement can be preserved. Few institutions, however, have sufficient personnel to permit extensive work outside of the repository.

In a repository which has a well-equipped receiving room, unpacking is an orderly process. The transfer cases containing loose material are surveyed to detect sequences of materials that may exist, as, for example, series of correspondence in alphabetical or chronological order, subject-matter files, and groups of deeds, contracts, speeches, or printed items. The materials are placed in uniform storage containers to which are affixed labels bearing the accession number, the

title of the collection, a statement on content, and, if the progression of the collection is clear, a box number. The temporary storage boxes are then placed on shelves to await further processing.

Collections that have some organization upon arrival can be unpacked quickly. The materials with no organization, massed in containers, are those which require the greatest care. They are unpacked piece by piece or by carefully inspected handfuls. Loose sheets are fastened together, and crumpled pieces are flattened. Damaged or fragile sheets are placed in folders to protect them from further harm. Unidentified bundles of papers are kept together, for important relationships may be destroyed if the pieces are separated before their contents are known.

When collections are unpacked piece by piece, preliminary sorting may be done during the process. In a group that is to be arranged chronologically, items may be segregated by years or by groups of years. Letters in a group that is to be organized alphabetically can be separated into easily manageable units. In any event, the processor should gather during the first handling information for use in organizing and cataloging. Since a good deal of time usually elapses between unpacking and further processing, data concerning arrangement, contents, value, and physical conditions should be recorded in a memorandum, a copy of which should be filed with the collection.

Broadsides, programs, pamphlets, and other published materials which may prove to be an integral part of the collection are held with it. If they are already separated from the manuscripts, they are boxed, identified as published items, and keyed to the collection by placing the title and accession number on the labels.

Books, museum objects, and photographs which are obviously not a vital part of the collection, but which are of interest to other departments of the institution, are forwarded to them. It is helpful to have an inventory of transferred materials to file with the other information about the collection, but most institutions find the preparation of such lists too time-consuming to be practical.

While unpacking the collection, some evaluations can be made. Extraneous material, such as locks of hair, duplicates of readily available published items, leather strips, scraps of clothing, and bits of wood (even those labeled as slivers from the "Mayflower") can

be rejected immediately. At this stage, however, caution is used in discarding record material. Items that seem unimportant when viewed singly may contribute valuable information when studied in relation to the rest of the collection.

As volumes are unpacked, each is identified by type (ledger, journal, daybook, diary, minute book, appointment book, genealogy, scrapbook), name of individual or organization which created it, and inclusive dates. This information and the accession number are recorded on duplicate cards. One is inserted in the volume and the other is retained for use later in preparing a list of volumes for the register or inventory. The set of duplicate cards is helpful in deciding upon the sequence in which the volumes are to be arranged, particularly when the collection contains hundreds of them. If the volumes are fragile or if the storage area is dusty, it is advisable to wrap each volume and to fasten the identifying card on the wrapper.

Manuscripts, particularly those which will not be processed for some time, are inspected before they are stored for conditions that will cause deterioration. Damp sheets are dried between blotters to prevent mold, mildew, and other damages to ink and paper. If the repository has standard fumigating equipment, manuscripts are freed from insects, rodents and fungi by exposure in tanks. However, few small institutions have fumigation chambers. In their absence, it is recommended that the papers be exposed to the vapors of ethylene dichloride and carbon tetrachloride in an air-tight box for twenty-four hours and then thoroughly aired.¹

Preliminary cleaning is done to rid the materials of abrasives such as sand and plaster, and surface dirt that will smear when the papers are placed in storage. If the repository has the necessary equipment, streams of air should be blown on the manuscripts which are placed under a hood that sucks up the dust. Materials can be cleaned, too, with soft brushes, and with a paste-type wallpaper cleaner. Since only limited time can be spent on cleaning during unpacking, it is wise to postpone until later the removal of stains and other restorative processes.

¹ Adelaide Minogue, "Physical Care, Repair, and Protection of Manuscripts," *Library Trends*, 5:346 (January 1957); Arthur E. Kimberly, "Repair and Preservation in the National Archives," *American Archivist*, 1:111-112 (July 1938).

Organizing the Collection

After a set of manuscripts has been unpacked, the next step is to decide on a plan for its organization. In the course of unpacking a collection, the processor obtains a great deal of information important in planning organization. He knows the type of collection he has acquired, its bulk, its approximate dates, its physical condition, and the kinds of items it includes. To prepare himself further for making decisions, he learns as much as possible about the history of the materials and the person, family, or organization with which they deal.

Collections are so varied that it is impossible to formulate rules that will define precisely plans of organization. In almost every instance there is more than one way to arrange a group of materials. Inherent in many collections are special problems that cannot be foreseen and that can be solved only by working intimately with them. Fundamental to any organization, however, are two important principles: respect for the integrity, or basic structure, of the collection, and consideration for those who will use the materials. By keeping these principles in mind while devising the plan, the processor can organize an intelligible unit of source material out of a chaotic pile of papers.

The most common types of collections that processors are called upon to organize are the following:

1. *Personal papers.* Personal papers are created, and/or are received, by an individual or a family.
2. *Records of organizations.* Records of organizations are created, and/or are received, by a formalized group. Most often encountered in this category are the records of churches, businesses, labor unions, professional and trade associations, political parties, and social, civic, and cultural groups. Included may be the records of a single organization, those of an original organization and its successors, or those of related organizations bound together by single management or other factors.
3. *A combination of personal papers and records of organizations.* Many individuals file together their personal papers and the records of groups with which they are affiliated. The two kinds of materials may be well enough defined to make possible separate cataloging of the units; or they may be so intermixed that their relationship demands an arrangement by series within one collection.
4. *Groups of manuscripts deliberately assembled by a collector.* The groups may have been collected because of postal markings, autographs, letterheads, or subject material. One collector may specialize in hand-stamped covers; a second, autographs of the signers of the Declaration of Independence; a third, letterheads of Mississippi River steamboat companies; and a fourth, Civil War diaries.

A great variety of manuscript and other material is ordinarily found in collections. The most familiar types of manuscripts are the following: diaries; correspondence (incoming letters and outgoing letters, the latter appearing as carbon, letterpress, and looseleaf copies, or appearing as copies in letter-copy books and in drafts); copies of telegrams and cablegrams; memorandums of telephone conversations; daybooks; ledgers; journals; cashbooks; trial balances; accounts receivable and bills payable; profit and loss statements; auditors' or examiners' reports; annual statements; invoices;

bills of lading; warehouse receipts; waybills; cancelled checks; checkbook stubs; receipts; drafts; bank books; vouchers; time checks; time books; payrolls; personal accounts (household accounts and individual expense accounts); inventories (personal property, real estate, merchandise); bills of sale; agendas; minutes of meetings; proceedings; reports; organization charts; bonds; stock records and certificates; articles of incorporation or association; bylaws; constitutions; contracts; agreements; indentures; deeds; abstracts; mortgages; plats; tract books; homestead and preemption certificates; land patents; land warrants and scrip; tax records; field notes; maps and tracings; birth, baptismal, marriage, and death certificates; certificates of membership, election, and award; licenses; commissions; legal or court records (testimony, briefs, etc.); enlistment and discharge papers of military service; citizenship or naturalization papers; manumission papers; passports; lists (membership, committee, and subscription); school essays, copybooks, report cards, and diplomas; drafts and copies of bills, memorials, resolutions, proclamations, and treaties; patents, with sketches and other supporting papers; notebooks and research notes; registers; cemetery inscriptions; petitions; case files (doctors', lawyers', and social workers'); memorandums; manuscripts of literary works; friendship books; recipes; lectures; speeches; sermons; news releases; reminiscences; autobiographies; biographies; genealogies, family histories; interviews (notes and transcripts); questionnaires; and obituaries.

Just as there are manuscripts common to many collections, there are also papers peculiar to special professions, trades, and organizations. Examples are well logs of oil companies; printing samples of lithographers; credit files of banks; prescription records of druggists; grain ledgers of elevators; crop records of farmers; and drawings of architects.

Published materials as well as manuscripts appear in collections. The processor studies them, either at this point or later, to determine whether they are essential to the collection or whether they can be removed. He soon comes to expect published matter of all forms: valentines; Christmas and birthday cards; calling cards; invitations; menus; tickets; programs; scrapbooks; clippings; pamphlets;

circulars; posters; cartoons; song books; trade-marks and labels; seals; advertisements; prospectuses; constitutions and bylaws; articles of incorporation; minutes of meetings and proceedings; annual reports; yearbooks; currency; scripts; ration books; campaign literature; election ballots; time tables; and transportation passes.

Frequently the processor will find also included in a collection annotated copies of books and proofs, photographs, sketches, recordings, and three-dimensional objects, such as pens used to sign famous documents, seal presses, and miniatures of inventions that accompany patent papers.

Components of a collection may take many different forms. For example, manuscripts may be handwritten or typewritten, and published items may be printed by letterpress or reproduced by offset, mimeographing, multilithing, and other methods. Copies of both published and manuscript items may be handwritten, typewritten, or reproduced in photographic form. Materials, furthermore, may appear in the language in which they were first written, in translation, or in shorthand.

In deciding upon the organization of a group of papers, the first point to determine is whether the group contains more than one catalogable unit. If two or more units are discovered, they may be treated as separate collections or as distinct sections within one collection, depending upon the relationship of one unit to another.

An example of a group of records that includes several catalogable units treated as separate, though related, collections is that received in one shipment by the Minnesota Historical Society from the Weyerhaeuser companies. The collection contains the records of twenty-five distinct lumber, land, logging, and boom companies, related to one another in varying degrees through stock ownership or management by members of the Weyerhaeuser family. Since the group was already divided into twenty-five units, with little mixture of materials, retention of the separation made further arrangement simple. The great disparity among the functions of the various firms made individual cataloging advisable. The original relationship of the material was expressed through cross-reference cards in the catalog, and its common origin was documented by using the same accession number for all the collections.

The Gilman Papers in the Minnesota Historical Society are an example of a group that contains two catalogable units with sub-units so closely related that they are treated as distinct sections within one collection. The first section consists of the family papers (1761–1952), documenting the private, business, and professional lives of several generations of the family; the second section consists of professional files which are largely the records of the organizations (1914–1952) headed by Mr. and Mrs. Robbins Gilman.

The processor made the decision to catalog the collection of Gilman Papers in two units for the following reasons. The Gilman Family Papers are truly those of a family, consisting chiefly of correspondence, certificates, agreements, and other items best served by a chronological arrangement. On the other hand, the professional files of the organizations directed by the Gilmans include administrative correspondence, minutes, reports, accounts, and subject-matter files.

In many cases discernible units in collections cannot be segregated physically because of records-keeping practices that have been followed or because of the physical condition of the papers. For example, the William F. Davidson Collection in the Minnesota Historical Society contains a mixture of the personal papers of the family and the records of more than a dozen steamboat, grain elevator, real estate, and amusement companies which members of the family owned or in which they had an interest. Although the records of some of the firms are fairly complete (minute books, letter press books, ledgers, journals, etc.) it is impossible to isolate them as catalogable units for the following reasons:

1. Although most of the outgoing correspondence is in letter-press books identified by company name, many of the books actually dealt with the transactions of more than one firm, and combined commercial and personal business.
2. The incoming letters were completely disorganized; it was not possible to divide them by unit.
3. Many of the financial record books were unidentified. Since the business of several of the companies was closely related, it was not possible for the processor to do the amount of

research necessary to classify unidentified volumes by company.

Whenever the processor has serious doubts about whether sections of a group should be cataloged as units within a collection or as separate collections, it is preferable to leave them together. The unwarranted splitting of collections may work irreparable damage by destroying the interrelationship of materials. The units can always be defined in the physical arrangement and description of the collection.

After the decision on the catalogable unit has been made, the processor is ready to choose the type of arrangement he will employ within the unit. The systems he considers are arrangements by alphabet, chronology, subject matter, document type, or any combinations of two or more systems.

The chronological arrangement is most often used. It is frequently employed in arranging personal papers in which correspondence predominates and in arranging special series within large and complex collections. It is used, too, for systematizing manuscripts that come to the repository in such chaotic condition that it is impossible to restore them to their original organization.

The chronological arrangement is simple for processors to execute and for scholars to use. An untrained staff member can learn quickly how to sort materials by date if he is given instructions on how to handle undated items, documents bearing more than one date, and groups of related items that need investigation before the grouping is disturbed. Historians, particularly those writing biographies and studies focused on periods, find the chronological arrangement a convenient framework in which to conduct their research and check their documentation.

Because of the favor the chronological arrangement has found with both processors and scholars, there has been some tendency to overemphasize its general utility. A few processors, in fact, suggest that it is the only satisfactory method of organizing papers.

There are other systems of organization, however, that can be recommended because they serve a special need of scholars, because they preserve values in a collection that would be impaired by a

chronological arrangement, or because a repository does not have a sufficient staff to sort the voluminous collections that have become commonplace in the midtwentieth century.

One of the systems that serves a special need of scholars is the alphabetical-by-author arrangement. This organization is useful only for collections in which correspondence predominates and in which the material is generally approached through the names of correspondents rather than through time progression. In such an arrangement, the incoming letters are filed by author. The outgoing letters are either filed in the alphabetical sequence by the name of the recipient or placed in a separate chronological series. If they are in letter-press or letter-copy books, their order is not disturbed.

When the processor receives a large collection that is already arranged by subject matter, either by alphabet or series, he should consider retaining the arrangement, or features of it, for the following reasons: (1) the integrity of the collection might be impaired by separating items that are in subject-matter folders or by removing items from series; (2) the grouping given to the materials by the individual or organization creating them might well be more helpful to searchers than other arrangements; (3) the physical mass of a collection might make reorganization impossible for a repository with a limited staff; and (4) existing indices or file guides accompanying the collection, which might be valuable reference tools, would be rendered useless by a change in the arrangement. If the collection does not include finding guides, the processor must prepare a register or inventory which will explain the arrangement and also detail, as much as possible, the contents of each series, section, or file.

Some subject-matter organizations, however, are so unsuited to the historical approach that retention of them would be tantamount to retaining an unorganized collection. In processing a collection that has been moved from place to place and disarranged, it is often less work, and safer for the collection, to reorganize it than to attempt to fit into the remnants of the system the pieces that have escaped.

Subject-matter filing should not be imposed on an unorganized collection. Classifying manuscripts by subject requires a great deal

of time for analysis and sound judgment in choosing subject headings. Because individual manuscripts do not conveniently confine themselves to one subject, such classification demands extensive cross referencing. The resultant collection may be bulky, difficult to describe, and, perhaps most important of all, it may have suffered from the decisions of the classifier.

Some collections, or parts of collections, are best arranged in series of document types. Examples of materials that should be arranged thus are long runs of contracts, deeds, legal files, and case records. Retention of the series is especially important when the items are numbered or coded, and when they are accompanied by indices. Another use of the arrangement by document type is in grouping volumes. They are generally organized first by record types and then arranged chronologically, unless another consideration, such as a subdivision within the collection, dictates a different sequence.

A few examples of how large collections have been organized will illustrate how the various arrangement systems described above can be advantageously combined. In organizing the Gilman Papers (see p. 341), the processors used a combination of chronological, subject-matter (by alphabet), and document-type arrangement. A sequence of part of the material follows:

- I. Gilman Family Papers.
 - A. Genealogical material, family histories, and obituaries. (This file is placed at the beginning of the collection to furnish background on the family helpful in understanding the materials.)
 - B. Correspondence and other papers, arranged chronologically.
 - C. Published materials relating to the Gilman family.
 - D. Mounted clippings relating to the Gilman family.
 - E. Speeches, articles, poems, and other manuscripts written by members of the Gilman family.
- II. Professional files of Mr. and Mrs. Robbins Gilman.
 - A. Records of the Women's Cooperative Alliance. (The organization was dedicated to the improvement of the condition of

women and children. Mrs. Gilman was executive secretary of the Alliance.)

1. Annual reports, arranged chronologically.
 2. Literature published by the Alliance, arranged by publication series.
 3. Materials not published by, but germane to the work of, the Alliance.
 4. Subject-matter files, arranged alphabetically. (The subject-matter files, built up by Mrs. Gilman, contain correspondence, pamphlets, reports, speeches, court testimony, interview notes, and other materials. Although they do contain some items not related to the work of the Alliance, the organization was not changed.)
- B. Records of the Northeast Neighborhood House. (The organization, dedicated to aiding immigrants in Northeast Minneapolis, was directed by Robbins Gilman.)
1. Annual reports, arranged chronologically.
 2. Research notes and transcripts of materials, gathered when a book was to be written on the organization, retained in their original subject-matter divisions.
- C. Motion picture files.
1. General files relating to motion pictures, including speeches, court testimony, published items, resolutions, and other materials, arranged first by type of material, then, as far as possible, chronologically.
 2. Records of the motion picture committee of the National Council of Women and the International Council of Women. (Mrs. Gilman was chairman of the committee.)
 - a. Correspondence, arranged chronologically.
 - b. Published materials, arranged by series.
 3. Records of the Motion Picture Guild of America. (Mrs. Gilman was president of the organization.)
 - a. Articles of incorporation, bylaws, and other material relating to organization.
 - b. Correspondence, arranged chronologically.
 - c. Mrs. Gilman's diary.
 - d. Published materials, arranged by series.

4. Records of the motion picture committee of the National Congress of Parents and Teachers. (Mrs. Gilman was chairman of the committee.)
 - a. Constitution, bylaws, and other materials relating to the organization of the Congress and the committee.
 - b. Work plans.
 - c. Minutes.
 - d. Correspondence, arranged chronologically.
 - e. Film lists.
 - f. Addresses and conference notes.
 - g. Press releases and statements of policy to other news media.
5. Records of the Federal Motion Picture Council in America, Inc. (Mrs. Gilman was president of the organization.)
 - a. Articles of incorporation and miscellaneous data on organization.
 - b. Treasurers' reports and statements by the auditors.
 - c. Reports.
 - d. Resolutions.
 - e. Minutes and proceedings.
 - f. Correspondence, arranged chronologically.
 - g. Published materials, arranged by series.

Considerable work was done on rephrasing subject headings that would have been meaningless to scholars and in consolidating files that dealt with the same subject but were titled differently. Attention was given also to replacing material that had escaped from the various series.

The organization chosen for the collection is by no means the only one that would have worked. The two units could have been cataloged as two collections instead of two sections of one collection. The plan adopted preserved the close relationship of materials, which could be easily cataloged for the use of searchers.

The arrangement of the Laird, Norton [Lumber] Company records illustrates another use of combined subject-matter, chronological, and document-type organization. The incoming letters and related papers were already grouped by subject when the collection

arrived. The groups were checked for internal order and filed in boxes labelled with the subject-matter title and inclusive dates. The outgoing letters, bound in letter-press books, already had a chronological arrangement.

Consideration was given to reorganizing the incoming letters into a chronological file to correlate with the existing arrangement of the outgoing letters. This possibility was rejected for three reasons: (1) The divisions are logical ones, eminently useful to scholars seeking information on subjects such as logging contracts, timberlands, cut-over lands, and firms with which the Laird, Norton Company had business relations; (2) the grouping of the papers into well-defined files is itself indicative of the functioning of the company; and (3) retention of the original order saved the staff weeks of sorting time.

The volumes in the Laird, Norton collection were classified first by record type (letter-press books, ledgers, journals, and daybooks) and then by date within each record group.

The records of the Congregational Conference of Minnesota serve as an example of an arrangement system for a collection containing materials on predecessor and related groups as well as on the main organization. The following sequence was chosen:

- I. Records of organizations that preceded the Congregational Conference, arranged first by group, second by record type, and third by date.
- II. Records of the Congregational Conference of Minnesota, arranged first by record type, then by date.
- III. Records of churches and auxiliaries that make up the Conference, arranged first by group, second by record type, and third by date.

In the William F. Davidson Papers (see p. 341), the conglomeration of personal and business papers that could not be segregated into catalogable units, was arranged in the following sequence:

- I. Printed materials, most of them undated, relating to the family and the companies.
- II. Genealogical papers.
- III. Incoming letters and related papers, arranged chronologically.

- IV. Invoices and financial statements, filed chronologically. (These papers were filed separately from the correspondence and other items because of their bulk and low content value.)
- V. Deeds and contracts, filed in the numbered series in which they were found.
- VI. Insurance policies, filed by type of insurance. (These policies were filed separately from other papers because they are too large to place in standard file containers. They were placed in oversize file cases.)
- VII. Cancelled checks, retained in the chronological order in which they were found. (The checks were not interfiled with other material in chronological series because of their relatively low research value.)
- VIII. Volumes, arranged according to (a) record type, (b) name of firm, and (c) date. At the end of each record-type series is a list of volumes that could not be identified by firm name.

An example of simple arrangement of personal papers is that employed in organizing the Frank B. Kellogg Papers. The manuscripts are arranged chronologically, with one exception: subject-matter files with materials relating to treaties and conferences are retained as special groups. These files are placed in chronological sequence by the events they document. The inclusive dates of the papers within the folders are recorded on the outside of the folders.

A great deal of study on sequences in the organization of large collections of business records has been done by the staff of the Baker Library, Harvard University. Its former librarian, Arthur H. Cole, has written:²

Experience indicates that usually the bound volumes of a large collection fall into a few, rather definite categories. To be sure, special collections may require special treatment. . . . More frequently, however, arrangement will be most generally satisfying if something like the following outline is utilized in the task:

² Arthur H. Cole, "Business Manuscripts: Collection, Handling, and Cataloging," *Library Quarterly*, 8:107-108 (January 1938).

1. Administrative records
 - a. Articles of incorporation
 - b. Directors' records
 - c. Stockholders' records
 - d. Shares of stock
 - e. Dividend records
 - f. Administrative contracts
 - g. Deeds, etc.
2. General accounts
 - a. Day books (1. Blotters; 2. Waste books; 3. Day books; 4. Journals)
 - b. Ledgers
 - c. Cashbooks
 - d. Petty cash
 - e. Trial balances
 - f. Bills payable and receivable
 - g. Notes payable and receivable
 - h. Bank balances
 - i. Checkbooks
 - j. Insurance
3. Purchase and receiving records
 - a. Invoices
 - b. Purchases
 - c. Supplies
 - d. Paid bills
 - e. Bills of lading
 - f. Freight bills
 - g. Inventories
4. Production records
 - a. Labor (1. Time books; 2. Pay rolls; 3. Tenement records)
 - b. Records of amount produced . . .
5. Sales and shipping records
 - a. Orders
 - b. Sales
 - c. Consignments
6. Letters . . .

In all these cases, the individual items should, of course, be arranged chronologically within each group.

The unbound papers must be sorted in some manner to facilitate evaluation. . . . Here again the plan worked out for the whole collection will serve as a guide, although certain refinements may often be

introduced with advantage. Most items of this character subdivide into the following groups:

1. Agreements
2. Paid bills
3. Customers' orders
4. Letters . . .

In each group or subgroup, the material should, of course, be arranged chronologically.

In organizing any of the collections given above as examples, different arrangements could have been devised and further refinements introduced. The systems chosen were decided upon because they followed as closely as possible the basic form of the papers, produced a logical sequence of materials, and, accompanied by descriptions, made accessible to searchers parts of the collections as well as the whole of them.

Sorting

After decisions on the organization of the papers have been made, their physical arrangement begins. If the person who has planned the organization undertakes the sorting, he can make desirable changes as he proceeds. However, if the sorting is assigned to another staff member, that person should be given a memorandum summarizing the information about the collection and should be guided in making changes in the organization. It is desirable for the sorter to add to the information as he progresses with his work, for data gleaned in sorting papers will facilitate the final work of the cataloger.

The arrangement and equipment of the processing room is an important factor in sorting large collections efficiently. Desirable features are shelves to store unprocessed manuscripts in as good order as possible, and to receive arranged or partially arranged papers from the sorting tables; tables designed to bring a maximum amount of space within reach of the sorter; movable units of pigeon holes built in sections that can be assembled to accommodate letters of the alphabet or years, months, and days; and various sorting devices developed by manufacturers of business equipment.

The first step in the sorting process is to break the collection into manageable units, dividing the materials by letter if an alphabetical

arrangement is to be used, and by year or decade if the arrangement is to be chronological. The processor examines each item for completeness; checks the order of the pages; removes paper clips, strings, and rubber bands; and staples with rust-proof staples those sheets that should be held together. If there are too many pages to be stapled together without tearing the leaves, or if the enclosures are bulky, the processor puts the materials in a light-weight, acid-free folder, and writes the dates of the contents on the outside of the folder.

The processor keeps a careful check on undated and partially dated documents. Through studying the relationship manuscripts bear to one another he may be able to supply missing dates. For example, if he finds an undated letter in a file of letters for January 1872, he reads adjacent documents in an effort to establish a date or an approximate date. Occasionally in sorting bundles of correspondence it is possible to approximate a date for a letter from the postmark of its covering envelope. The date established by the processor is written on the manuscript in soft pencil in the upper right corner and is enclosed in square brackets. When no date can be established, the item is placed in an undated file, either at the beginning or the end of the collection. Letters bearing only the year date are placed in the file at the beginning or at the end of the year; those bearing only month and year dates are placed at the beginning or end of the month.

Other details that can be taken care of during the first handling are these: (1) the isolation of materials such as microfilm, tape, phonograph records and oversize items that remain a part of the collection but require special filing equipment; (2) the establishment of a file of fragments for constant review during all stages of processing; (3) the transfer to appropriate divisions of the repository or to other institutions of public records, pictures, and printed items that are not an essential part of the collection; and (4) the return to the donor, or destruction, of materials that at this stage are known to be of little value or quite useless.

During sorting, the processor may remove from the collection damaged documents that he did not discover during unpacking. At this time he may clean and repair what items he can. The important

papers that require care beyond his skill he may order restored by experts who have special equipment not available in his institution.

An important part of caring for manuscripts in the preliminary stages is flattening them. Folded documents that have not been smoothed out during unpacking are placed in presses. If the papers have only light folds, they can be placed in folders where the pressure of other materials in the filing box will be sufficient to remove creases. If the folds are stubborn or if the papers are brittle, they require special handling described below in the section on preservation.

Once the first handling is completed, the subdivision according to months and days, or according to the alphabet, proceeds with relative ease. A few problems do occur. The file of fragments is surveyed whenever another incomplete manuscript that might match up is discovered. It may be necessary also to decide whether to leave a letter and its response stapled together when they are found together, whether to separate them, and if they are separated, whether to note the original relationship by cross-reference sheets or notations on the manuscript, or whether to make no provision for preserving the information that the two items were found together. In dealing with voluminous groups, the current tendency is to leave the letter and response together.

Enclosures, too, may be treated in various ways. In the past, advocates of strict chronological arrangement separated the enclosure from the letter, or other covering document, prepared cross-reference sheets to indicate the physical relationship that was disturbed, and, in their full catalogs, made references both to the original location of the enclosure and its changed location. Today most processors leave the enclosure with the covering document. This trend is strengthened by the change from item-by-item cataloging to a more general system and by the belief that most searchers use the enclosure with the covering document.

Checking series and subject-matter files is more complex than chronological and alphabetical filing. The contents of each file are examined and put in good order. The subject-matter title is reviewed for logical expression and for relationships with other files. Files that deal with the same subject, but which are classified under

different titles, are combined. A long step toward cataloging can be made at this stage by recording subject-matter and series titles, and by making notes on filing systems as the material is examined.

In the final stages of sorting, files of published materials, clippings, speeches, oversize materials, and other special groups are put in order. Clippings may be mounted on acid-free paper and filed together if the number is extensive, or interfiled with the manuscripts in protective folders that will keep them from staining adjacent manuscripts. Photostats and other items that will damage manuscripts they touch are also placed in protective folders or separated from papers in the collection.

The materials are now placed in acid-free folders and filed in storage boxes. Ideally, to afford maximum protection, each manuscript should be placed in a separate folder, but costs force most repositories to compromise by grouping up to perhaps twenty-five pieces in a folder.

If the collection has been given its location symbol and if it is probable that extensive weeding will not be necessary during cataloging, folder labels can be prepared at this time. The folder label should bear, in addition to the location symbol, the title of the collection, an indication of the contents of the folder, and inclusive dates. To insure compliance with restrictions on the use of materials, some institutions indicate on the folder labels that restrictions do exist. For example, a folder label in the Frank B. Kellogg collection reads:

A Kellogg (Frank B.) Papers.
.K30 Correspondence, Jan. 13-17, 1926.
 Restricted.

Box labels can also be prepared at this time. Included should be the box number, location symbol, collection title, and an indication of content. As an example, a box label for the Frank B. Kellogg collection reads:

A Kellogg (Frank B.) Papers.
.K30 Correspondence, Dec. 1, 1925-Feb. 10, 1926.
Box 12 Restricted.

Since the processor had a duplicate set of cards prepared when the materials were unpacked, volumes can be arranged with considerable ease. He sorts the cards according to the organization that has been decided upon and numbers them in sequence. He then locates on the shelves the volume that bears the duplicate card. On the card in the volume he records the number that has been assigned to it, and writes on the inside cover, or first page, both the volume number and location symbol. When this work has been completed, he places labels on the volumes, and destroys the cards in the volumes. From the duplicate cards he prepares his list or inventory of volumes that will form a part of the register of the collection. The Frank B. Kellogg volume list begins thus:

Volume 1—Scrapbook, 1907.

Volume 2—Scrapbook, Sept. 1, 1924—Feb. 25, 1925.

After a check has been made of the volume labels and list, the duplicate cards are destroyed.

Evaluation

Every stage in processing requires the use of critical judgment and training in the skills of handling papers. In no area are these qualities more important than in evaluating manuscripts. Unlike decisions made at most other points in processing, those made on whether to preserve or to dispose of materials are definitive. Items returned to donors can rarely be recalled; those that are destroyed are lost forever. The finality of the decisions has induced so many doubts that many processors are reluctant to weed collections.

Custodians of historical manuscripts are conservators by inclination and training. Rooted in traditions of scholarship and trained largely in intensive work with small or moderate sized collections, they find it difficult to deal with the problems inherent in the great volume of recent manuscripts and the limited physical resources of their institutions. Even faced with a collection that contains millions of pieces, they are still acutely aware of the damage that can be done by quick decisions, limited understanding of the scholarly processes, inadequate knowledge of subject matter, and a narrow perspective on documentation for future scholars.

Awareness of the demanding nature of evaluation can, however, lead to inertia. The situation could be tolerated and wastes could be accepted in the interests of insurance against all scholarly contingencies, if collecting institutions could provide the necessary storage

space, filing equipment, and personnel, and if scholars did not of necessity depend upon custodians to use some discrimination in reducing bulk to reasonable limits.

When manuscripts processors do destroy papers, they are understandably hesitant to circulate the standards by which they have judged the materials. The archival profession has been bolder in establishing such standards and publicizing them. Driven by necessity, it is developing criteria for evaluating public records and for systematically scheduling classes of material for retention or disposal.

The crisis engendered by massive twentieth-century collections came to custodians of historical manuscripts later than to archivists. And when it did come, the problem of dealing with it was different. Some institutions, not equipped to handle the mass, restricted their collecting to an earlier period or to a special subject and neglected documentation of the new area. Others, tackling the problems of modern documentation by applying archival techniques, decided that historical manuscripts are as varied as public records, but, being more formless, they are less susceptible to evaluation by class or record type.

A significant development in the search to establish criteria of evaluation, heralding the cooperation of manuscripts experts and subject-matter specialists, was the work of the 1948 ad hoc committee on manuscripts of the American Historical Association. In considering the compelling necessity for evaluating papers and the dangers inherent in the process, the committee concluded that a sense of proportion was urgently needed, that custodians of manuscripts "must be wise enough, and bold enough, to take a calculated risk, and that the historian and the biographer must recognize the difficulties, assist with conference and advice whenever possible, and, finally, accept the situation."⁸

Processors of manuscripts fully realize that now they, like the archivists before them, are driven by necessity. Within their own institutions, they have quietly worked out standards of evaluation, and a few of them have shared their hard-won experience by writing

⁸ Report of the committee in *American Archivist*, 14:232 (July 1951).



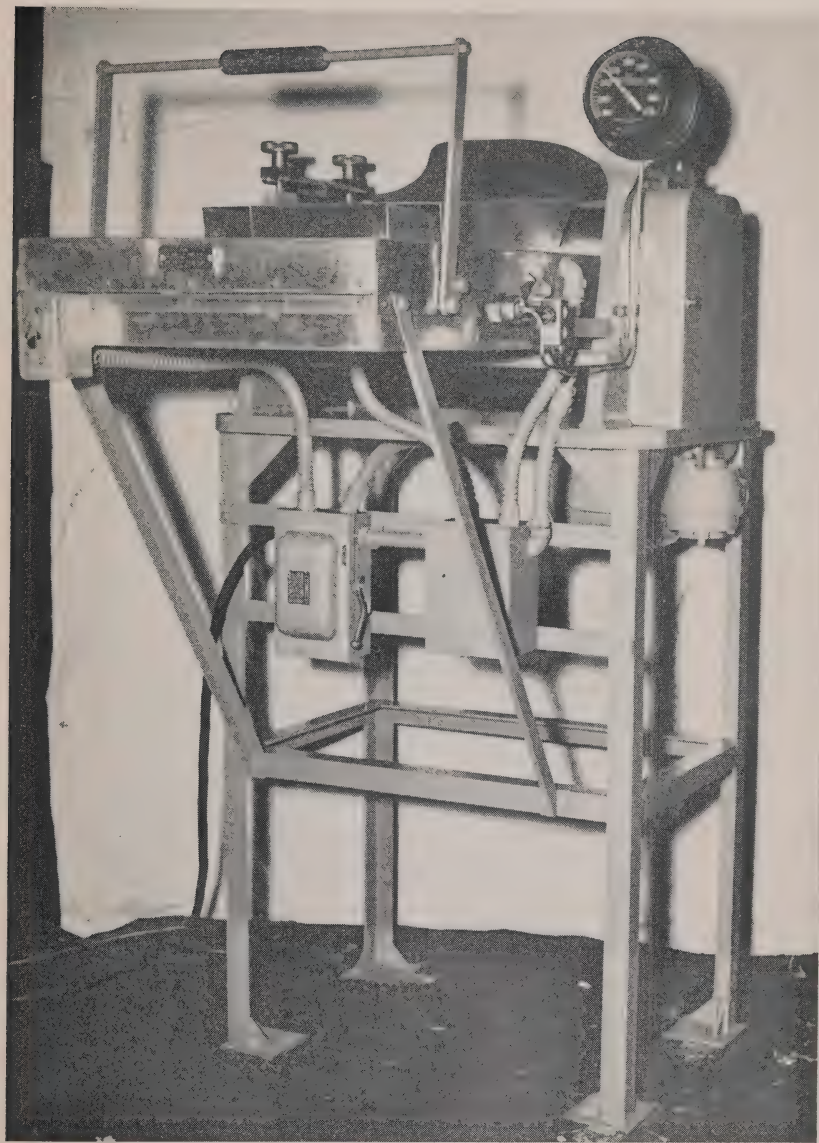
Two handy devices to sort manuscripts in the Library of Congress. For a chronological arrangement of papers, each slot in the pigeonhole unit is marked for a particular year, or for the month of a year. Ann Gaillard, arranger-indexer in the presidential papers section of the manuscripts division, is sorting the contents of one pigeonhole into more detailed categories by means of an "easy-sort" device.



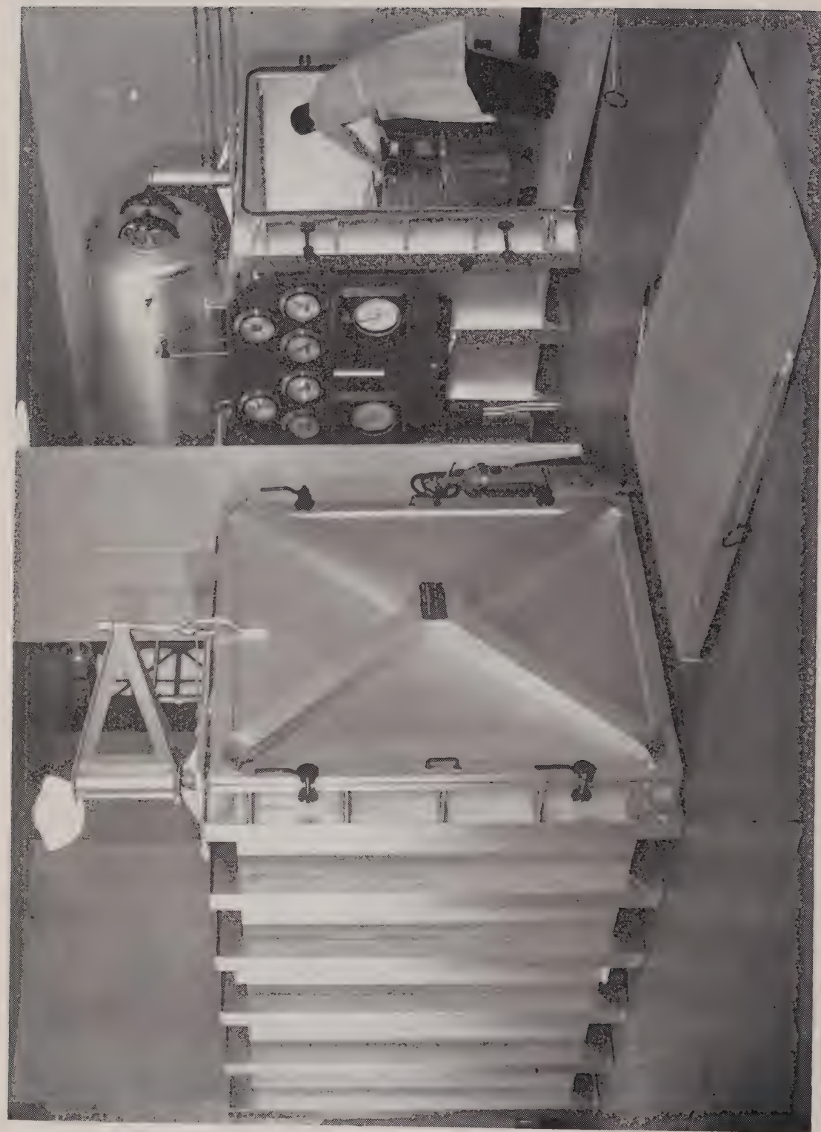
The two cleaning tables in the National Archives. Here loose dust and dirt are removed from records by compressed air which is blown carefully across and through the papers. The dust is pulled from the area through screens on the table tops and at the rear of the tables into filter units.



A close-up photograph of the compressed-air cleaning process at the National Archives.



Laminator, developed by William J. Barrow, Richmond, Virginia.



The two steel vacuum fumigation tanks in the National Archives.

articles for professional journals. Progress has been slow and the efforts admittedly experimental. Although their conclusions are usually stated as provisional, as subjective judgments dependent upon the nature of the collections with which they are dealing, they are welcomed by their colleagues who are trying to solve the same problems. A summary of the work that has been done may be helpful in current operations and provide a spring board for further investigation.

The evaluating process actually begins in the preliminary examination, when the collection is rejected or accepted, and continues throughout all stages of processing. As the custodian unpacks the materials, he weeds out certain items, characterized by David C. Mearns as "hats, guns, and dog houses."

Other materials are isolated during unpacking, or later, if their value is in doubt, for transfer to other institutions or to other departments of the repository. Among them are archival estrays, i.e., public records existing as well-defined units in sets of personal papers and organization records. Archival estrays most commonly found are groups of school records, township records, and papers of official boards, commissions, and committees, all casually retained by members of the bodies in days when little attention was given to the distinction between personal and official records. These units can be transferred easily to the proper archives. However, when public records in personal papers are intertwined rather than isolated, it is not advisable to disturb the collection by attempting a segregation.

Published items, pictorial materials, and sound recordings that are judged not to be an integral part of the collection and that can be cared for in special departments of the repository are transferred to them immediately. If they are related to the collection, although not an essential part of it, evidence of the relationship can be expressed by retaining a list of transferred material with the description of the papers.

An item considered for rejection must be evaluated both as a part of the collection and as an individual piece. Types of materials that may be rejected after study as not possessing value in either sense are these:

1. Fragmentary account books, unsupported by other papers. (Such books can be seriously considered for rejection if they are not important because of their author or organization, if the repository already has samples of the same type of record for the same period.)
2. Diaries that are not important because of author or content.
3. Duplicates, such as carbons of letters, speeches, programs, and agendas.
4. Records that contain information duplicated in another form of record.
5. Subsidiary documents, the essential data from which is included in summary records.
6. Housekeeping records, both in personal papers and records of organizations. (These may include household bills and receipts, insignificant interoffice memorandums, and a dozen types of records that were important in daily operations but have little or no importance in historical perspective.)
7. Envelopes, or covers, which are not important as a part of the letters or for stamps or postal markings.

In many instances, there are in a collection long series of papers that have some possible research importance, but relatively slight value in relation to the bulk. Examples are the thousands of form letters, job applications, cancelled checks, invoices, bills of lading, and membership cards and lists found in both personal papers and records of organizations. The custodian who is seriously concerned with reducing bulk and whose institution can bear the cost can have the series microfilmed and destroy the originals. If the convenience of the historian rather than the freeing of space is the important factor, the series can be removed from more valuable papers and retained separately.

In considering massive collections of business papers in which operational organization has been retained, a functional approach can be used. Among the records that should be saved are those created at the policy-making level. Further down the scale will be correspondence and other papers with strictly housekeeping functions. When the essential information on the work of the units is

found in other records, and the retention of the housekeeping records would provide only repetitive details, they can be rejected safely.

The method described above—analogue to records disposal policies of the archivist—must be used cautiously and never in haste. The processor can employ it only after he is satisfied that he understands the over-all operation of the business, the functions of all its divisions, and the role of each type of record in documenting those functions.

A little study has been done on the reduction of bulk by sampling. For example, confronted with the bulk of Congressmen's papers, processors have discussed the possibility of saving full correspondence for sample years, including all the trivia, and weeding the papers for other years. They have considered counting form letters, making notations on numbers and circulation, and discarding all but a sample. Similarly, in dealing with business records, they have studied sampling at uniform periods, such as at ten-year intervals or selected points in a business cycle, and recording the essential data on scope and technique of sampling. Until more conclusive results are available, however, sampling must be classed as a highly subjective method that must await development before it can be used widely.

An excellent example of a study of appraisal methods resulting in sampling, discarding, and isolating low-value materials is the project conducted at the Baker Library in 1951.⁴ Out of such studies, accumulated experience, and new thinking will come better methods of evaluation than can be chronicled at this time.

⁴The procedures and conclusions are described by Robert W. Lovett in his article, "The Appraisal of Older Business Records," *American Archivist*, 15:231-239 (July 1952).

*Preservation**

Essential elements in preserving manuscripts are fumigating and cleaning, flattening, repairing, restoring, storing, and protecting from theft and careless handling.

Since so many papers created before the close of the nineteenth century were folded, flattening manuscripts is one of the most time-consuming steps in preservation. Incoming letters and other papers were tied in bundles or placed folded in containers like the Woodruff file. Valued papers were folded to fit into trunks, safes, boxes, and safety deposit vaults, or were left in their original envelopes.

*Valuable information on the historical evolution of restoration processes, filing equipment, paper, and ink, as well as more specific details on preservation practices than could be included in this section, are contained in the following references: William J. Barrow, *Manuscripts and Documents: Their Deterioration and Restoration* (Charlottesville, Virginia [1955]); Barrow, "An Evaluation of Document Restoration Processes," *American Documentation*, 4:50-54 (April 1953); William J. Van Schreeven, "The Filing Arrangement of the Archives Division, Virginia State Library," *American Archivist*, 11:248-251 (July 1948); Victor Gondos, Jr., "A Note on Record Containers," *American Archivist*, 17:237-242 (July 1954); Gondos, "Era of the Woodruff File," *American Archivist*, 19:303-320 (October 1956); L. Herman Smith, "Manuscript Repair in European Archives," *American Archivist*, 1:1-22, 51-77 (January, April 1938); Arthur E. Kimberly, "Repair and Preservation in the National Archives," *American Archivist*, 1:111-117 (July 1938); Harold W. Tribolet, "Binding and Related Problems," *American Archivist*, 16:115-126 (April 1953); Harry F. Lewis, "Research for the Archivist of Today and Tomorrow," *American Archivist*, 12:9-17 (January 1949); Adelaide E. Minogue, "Some Observations on the Flattening of Folded Records," *American Archivist*, 8:115-121 (April 1945); Minogue, "Physical Care, Repair, and Protection of Manuscripts," *Library Trends*, 5:344-351 (January 1957); Minogue, *The Repair and Preservation of Records*, *Bulletins of the National Archives*, Number 5 (Washington, 1943).

Some papers, of course, were flat filed. They were mounted, framed, placed in portfolios, filed in boxes like the Amberg container, or fastened in flat packets by wires or clamps. Outgoing letters, flat filed too, were recorded in letter books.

The wide-spread adoption of carbon copies and new filing equipment soon after the turn of the century greatly reduced the number of folded papers, but it has not eliminated the practice. Folding persists in many offices, particularly in filing deeds, contracts, insurance policies, abstracts, and legal dockets. Families, too, still bundle up papers in compact packages for filing in time-honored niches rather than in equipment for flat storage.

Most papers are preserved better and are more easily accessible when they are flattened. Exceptions may be heavy packets made of strong paper, labelled on the outside with series numbers, abstracts of content, and other convenient reference data. These packets may well be left in their original condition and filed upright in standard containers, particularly when they are seldom unfolded for use.

Factors affecting the condition of folded papers are the quality of the paper, the extent to which they have been used, and the conditions under which they have been stored. Papers manufactured in the United States up to the early years of the nineteenth century were usually hand-made sheets of one hundred per cent rag fiber. After 1827, when the Fourdrinier paper machine was introduced, large quantities of low-quality paper were produced. This paper, made of straw, wood-pulp, and other fibers, and containing acids and lignins, deteriorated more rapidly than the earlier product. Deterioration was accelerated when folded manuscripts made of the low-quality paper were used extensively or carelessly, and were stored where the air was too dry, too wet, or polluted with injurious gases.

Papers that have become brittle in storage must be rendered flexible enough to bend without breaking before they can be flattened. Expose them to 90 to 95 per cent humidity in a chamber built particularly for the purpose. If a humidifying chamber is not available, substitute equipment can be constructed in which manuscripts can be placed near to but separate from water. Ellen Starr Brinton describes a "home-made humidifier" that is in use at the Swarthmore Peace Collection:

The foundation container is a fifty-pound lard can. An aluminum pie plate, holding a large sponge saturated with water, is placed on the bottom of the can. Over this is placed a piece of aluminum fly screen to prevent the objects to be humidified from actually touching the wet sponge. When the can is filled with papers the lid is put on tight. In a few hours or overnight the papers absorb an astonishing amount of moisture. . . . They can be handled with ease, but speed is necessary since the dampness evaporates rapidly. Each paper is spread out on white blotting paper and immediately put in a press. The next day materials so treated are flat, crisp, and smooth, as if they had been washed and ironed.⁵

There are several methods of removing folds from manuscripts that have been humidified as well as those flexible enough to flatten without addition of moisture. Papers that are but slightly creased will become sufficiently flat when packed firmly in storage containers. Others require the pressure of weights, such as heavy books, or presses. After humidifying, those with the most stubborn creases can be smoothed in a mangle or with a hand iron on a pile of blotters.

In certain cases, documents require special treatment in flattening. Adelaide Minogue advocates that "fragile items such as brittle tracing papers, documents that have been washed or bleached to remove stains, fragments of mildewed, water-soaked, or burned documents, and parchments, which do not tolerate ironing, may be more safely handled by spreading out each dampened sheet between blotters and pressing, without heat, until dry."⁶ To remove creases from vellum and parchment, the sheet should be flattened with hand pressure and then put onto a special frame with weights fastened to the perimeter.⁷

Restoration is another important step in preservation. The most satisfactory method that has yet been devised is lamination. This

⁵ "Inexpensive Devices to Aid the Archivist," *American Archivist*, 13:285 (July 1950).

⁶ "Some Observations on the Flattening of Folded Records," *American Archivist*, 8:120-121 (April 1945). For information on washing and bleaching, see Minogue, *The Repair and Preservation of Records*, 22-26.

⁷ Gust Skordas, "The Parchment Stretcher at the Maryland Hall of Records," *American Archivist*, 9:330-332 (October 1946).

process consists of two major steps: deacidification of the document, and lamination with a sheet of cellulose acetate film and a sheet of tissue to each side of the document.

Although laminating equipment is usually not available in small repositories, it is the only process that has yet been devised that restores and preserves documents adequately. It accomplishes restoration and preservation by removing the impurities which cause deterioration, protecting the surface of the manuscript from injuries, filling in holes, and mending tears. When dealing with valuable and badly damaged papers, it is advisable for repositories without laminating equipment to avail themselves of the services of a professional document restorer rather than to attempt repairs by other means.

For the large number of documents that need only minor repairs, methods other than laminating are feasible. Torn places can be reinforced by pasting thin, durable strips of paper over the breaks on the less important side of the manuscript. Oily stains can be removed with dry cleaning solvent. Water-soaked papers that can be separated without tearing can be dried between blotters and pressed. If the papers are stuck together, the mass can be resoaked and then separated. The sizing removed in the soaking can be replaced by dipping the documents in a thin glue or starch solution before they are dried.⁸

Repairing valuable bindings is a task that requires special skills. If the repository does not have a person with the skills and cannot afford to have the work done by trained persons outside the staff, it is better to wrap the volumes to prevent further damage (after mildew or mold have been controlled with fungicides) rather than attempt repairs. The number of important bindings that have been patched up with paste, glue, plastic tapes, and even punched and bound with string, testifies to initiative that cannot be commended.

In recent years warnings against the use of gummed or plastic tape for use in manuscript repair have been so widely circulated that processors are well aware of the injuries that result from their

⁸ Minogue, "Physical Care, Repair, and Protection of Manuscripts," *Library Trends*, 5:349-350. In Minogue, *The Repair and Preservation of Records*, 143, is a list of suggested equipment and supplies for the repair of records.

application. Manuscripts still reach repositories, however, with cracks, tears, and holes mended with tape. Processors can remove the tape with benzene, xylene, toluene, or carbon tetrachloride, but because the fumes from these solutions may be either flammable or toxic, they should be used in a well-ventilated room.

Experiments are constantly being conducted by the National Bureau of Standards and other agencies and individuals with materials and methods to produce more effective document preservation. William J. Barrow, document restorer who has been a leader in introducing new methods, lists the desiderata for methods now in use and those that will be developed in the future. He writes that every custodian of valuable documents who makes use of restorative or preservative measures should make certain that the following details have been observed:⁹

1. That all materials used in restoration, including papers, textiles, fibers, films, adhesives, etc., have been tested so as to conform to standards determined by laboratory experiment to promise permanency.
2. That all procedures, such as application of heat or pressure, used in the restorative process, are such as will not reduce permanency.
3. That the restorative measures are not so applied as merely to lock into the treated document those very elements . . . which are the causes of its deterioration.
4. That the materials used in restoration will assure the degree of flexibility, tear resistance, visibility, etc., required in view of the probable uses of the document.
5. That after restoration, the document is kept in such a physical position, and in such freedom from noxious materials or conditions . . . as will assure the durability which the restorative process has given it.

The final point is particularly important for processors who cannot utilize the services of document restorers, but who have in their care many thousands of manuscripts that must be preserved without individual treatment. A great deal can be done to preserve manuscripts that never pass through the hands of a restorer by making every effort to provide storage conditions favorable to preservation.

⁹ "An Evaluation of Document Restoration Processes," *American Documentation*, 4:53-54 (April 1953).

The life of paper is shortened by heat, light, dry air, excessive dust, sulphur dioxide fumes, and careless handling. By centering attention on these factors, the custodian will be able to minimize, if not eliminate, causes for future deterioration.

The first thing that can be done is to scrutinize carefully filing materials and practices. Acids in all materials that come in contact with documents can migrate to them. The most common manifestation of acid migration is the yellowing of paper to which a clipping has been attached. Thus, paper used for folders, cross-reference sheets, storage containers, mountings, and bindings should be made of acid-free materials. Simple instructions for testing the acid content of materials can be found in a publication of the National Bureau of Standards.¹⁰

Manuscripts should be packed carefully in dust-proof storage containers. Those that are filed vertically, or upright, should be packed firmly to aid in flattening and to prevent sagging. Volumes that are stored in areas where dust is not controlled should be wrapped or boxed.

Caring for oversize manuscripts is a special problem. It is preferable to file only a few large items in each folder and to place the folders in shallow drawers. It is helpful to arrange the folder labels so that they are visible without removing the folders from the drawers, since every handling increases the chances of damaging the materials.

The condition of the storage areas is an important factor in preservation. Shelves should be made of steel, with spaces for the circulation of air left beneath the lower shelf and above the upper shelf. The storage area should be fireproof and contain few windows. The temperature should be kept at seventy to seventy-five degrees Fahrenheit, and the relative humidity at fifty to sixty-five per cent.

In storage areas that are not air-conditioned, humidity and temperature readings can be obtained by using a hygrothermograph. Humidity can be decreased by using dehydrating chemicals, such as calcium chloride crystals. It is advisable, however, to consult with

¹⁰ Herbert F. Launer, *Determination of the pH Value of Papers*, Research Paper RP1205, National Bureau of Standards (Washington 1939).

local air-conditioning firms for their recommendations on equipment best suited to increase humidity.

In a repository that is air-conditioned, dust, a prime carrier of acids, can be reduced by washing incoming air and filtering it through glass wool filters. Sulphur dioxide fumes and other acid gases are eliminated by treating the washed air with a dilute alkaline solution of potassium dichromate. No method is known of controlling the sulphur dioxide fumes in repositories that do not have air-conditioning.

After the best methods possible have been used to protect manuscripts against deterioration, one more step in preservation is necessary: safeguarding the papers against theft and careless handling. Essential safeguards are:

1. Supervision of those who use the papers to insure careful handling and safety;
2. Prompt and careful refiling of manuscripts that have been in use;
3. Preparing special inventories, calendars, or lists of manuscripts that have particular value, to provide tools for an item-by-item inventory;
4. Taking periodic inventories of the entire collection to detect damages (such as mold, mildew, torn bindings), misfilings, and missing items.

In addition to these general precautions, some institutions screen carefully the persons who are admitted to the collection, inspect brief cases, post special guards, and mark the manuscripts with indicia of ownership. Fragile documents are often withdrawn from use, and photocopies of transcripts are substituted for them.

Cataloging

Cataloging is the final step in processing. The chief objective of cataloging is the preparation of reference tools that make accessible the information contained in manuscripts and establish the final controls over the collection.

Several kinds of reference tools are in common use. In deciding upon the type to prepare and the degree to which they should be employed in cataloging each collection, four considerations are important: (1) the nature of the collection; (2) the reference needs of the repository; (3) the resources of the institution; and (4) the requirements of the projected Union Catalog of Manuscripts.

The nature of the collection is of prime importance in determining the extent of analysis necessary to reveal its research resources. Thus, a collection that is important piece by piece should be cataloged intensively. A collection that has low-content value by the piece can be treated more generally. A collection with a complex organization should be analyzed in terms that make its arrangement understood. And items or series of particular importance within collections should be identified in the reference tools.

The second consideration in determining the type of cataloging that should be done is the reference requirement of the repository. The more general the cataloging, the more the use of papers will be restricted to those who are well grounded in their subject, or who

have time to make extensive searches. Repositories that are frankly committed to serving primarily the needs of advanced scholars are not as much concerned with the problem of developing reference tools that will isolate specific subjects or items as they are in defining general scope and physical characteristics. On the other hand, institutions devoted to the needs of a broader public—genealogists, local historians, scholars-in-training, scholars making searches in peripheral material, and persons seeking vital statistics for legal purposes—should develop detailed reference tools that will be helpful in locating specific information.

The resources of the institution, the third consideration, often determine the type of cataloging that will be done. Although the nature of the collection and reference needs are valid considerations, few repositories in the nation are well enough staffed to implement completely decisions made on the basis of them. The cataloging process is necessarily one of reconciling what should be done with what can be done. Making the compromises calls for considered judgment of the values involved.

The fourth consideration, the requirements of the National Union Catalog of Manuscripts, is important to the future service of scholarship. The objective of the Union Catalog is to centralize information about manuscripts by gathering in the Library of Congress entries for collections from all repositories participating in the venture, by incorporating the cards into a catalog and by distributing to all interested institutions printed catalog cards describing the collections entered.

To speed formation of the National Union Catalog repositories must incorporate into their cataloging systems certain essential data arranged in specified form. The Library of Congress, with the assistance of manuscripts experts from other institutions, has made a beginning in promulgating rules for the cataloging of the manuscripts. These rules, some of which are discussed below, and the others that will be issued in the future, should be considered by every processor who plans to contribute entries to the catalog.

The first step in cataloging a collection or an individual manuscript is classification. Since manuscripts are stored in closed stacks, they are classified for the convenience of the staff rather than the

public. The staff needs a system that has the following features: location symbols that are easy to record on catalog cards, that are simple to understand, and that show clearly the position of the material in the stacks; and a sequence of material in the stacks that permits the addition of new groups without major shifting.

Since storage areas and local needs vary so widely, no classification system yet devised can be recommended generally for all institutions. However, the following systems now in use are fairly successful:

1. Arrangement of collections by accession number, with periodic spacing in the shelves for additions to groups with potential growth.

2. Arrangement of collections chronologically. For example, the presidential papers in the Library of Congress are arranged chronologically by term of office.

3. Arrangement of collections by type, with subgrouping. In the Minnesota Historical Society, for example, the first division is between personal papers and records of organizations. The personal papers are arranged alphabetically by title of collection; the records of organizations are arranged first by type of organization and then by alphabet.

4. Arrangement of collections by geographic unit, with subgroupings. As an example, in the Clements Library the major division is between the Eastern and Western Hemispheres; the subgroupings are by alphabet and chronology.

A few repositories ignore classification completely and use as location symbols fixed shelf positions. Such a system has the advantage of simplicity, but it does make necessary changes of location symbols on finding aids whenever materials are moved.

Individual items or small collections are usually grouped together for convenience in storage. They are arranged by unit in folders labelled with the title and location symbol. The sequence of the units may be alphabetic by author, chronological by date of manuscripts, or document type with subgroupings. The essential purposes of any system adopted for classifying miscellaneous manuscripts is to keep the system as simple as possible and to use symbols that will enable the staff to locate an item quickly.

After the processor has classified a collection, he prepares the finding aids, or reference tools. Many finding aids have been developed to meet various local conditions and needs. They express the search for methods of delineating both the major features of a collection and isolating for individual use items within the collection. In cataloging small groups of papers, it is possible to accomplish both objectives. However, in large collections with low-content value it is necessary to stress group description and general expression of subject matter rather than individual item cataloging.

Progress in reconciling group description with detailed cataloging has been slow. But necessity has stimulated innovation. The compromise that has evolved has the following features: (1) a group description, called variously a "description," a "register," or an "inventory"; (2) a "main card" or a "collection card," and added entries, arranged in a dictionary catalog; (3) special catalogs, indices, calendars, and shelf lists to provide detailed information on particularly important manuscripts, or to fill a special reference or administrative requirement.

The process of gathering information for the preparation of the register and catalog is one of systematic note taking. Each cataloger, of course, develops his own methods with experience in analyzing different types of collections. The procedure outlined here, however, is one that functions well, particularly if the cataloging continues over a long period of time.

The steps in the work process are these. The name of each author (writer of letters, diaries, and other manuscripts), as it is encountered in arranging the collection, is entered on a 3" x 5" card, which is placed alphabetically in a card file.¹¹ The same process is followed for subjects (names of persons, places, organizations, and other subject matter). Since some of the author and subject cards may be

¹¹ Persons trained in book cataloging may find it helpful to know that manuscripts catalogers often include author as well as subject entries in their definition of added entry. Analytical entries are basically the same in both book and manuscripts cataloging. The manuscripts cataloger indicates location by box or file number, whereas the book cataloger frequently uses pagination to indicate where the item singled out for special mention can be found. Manuscripts catalogers list analytical entries with added entries whenever possible, since the function of listing added entries is to enable the staff to trace all cards that have been prepared for the collection.

eliminated when the final decision is made on entries to be included in the catalog, the processor can be generous in recording data. On full sheets of paper detailed notes are taken on the contents of each document container, series, or period of time forming a unit within the collection. When the finding aids are prepared, the full notes form the basis for the register and the card files for entries in the dictionary catalog.

The register is a valuable reference tool. It is used by the staff in answering questions about a collection, preparing announcements, writing entries for publication in guides, and, in the absence of shelf lists, in inventorying the repository's holdings. It is used by searchers both as the first step in preparing for extensive research in a collection, and in locating series or items of particular interest.

The extent of the register varies with the collection. All registers, brief or full, should include the basic elements needed for entering the collection in the National Union Catalog of Manuscripts. The elements, defined by Robert H. Land, are these:¹²

- (1) A title with inclusive dates of the manuscripts.
- (2) A statement of form, such as transcript or photocopy, if the manuscripts are not originals.
- (3) A physical description in terms of the approximate number of items or the linear feet of shelf space occupied by the collection (or both).
- (4) The name of the repository in which the collection is located. [This statement is necessary only on cards sent for entry in the National Union Catalog.]
- (5) A scope or contents note bringing out the type of papers, special features (such as the dates for which the material or particular segments of material is largest); and, for personal papers, essential biographical data and mention of names which are to be used as added entries.
- (6) Reference to the best or most nearly complete published description of the collection.
- (7) Notice of the availability in the repository of any unpublished guide to the organization and content of the collection.
- (8) Comment if there are restrictions on access to the collection.
- (9) Statement of availability of information on literary rights.
- (10) Note on provenance.

¹²Robert H. Land, "The National Union Catalog of Manuscript Collections," *American Archivist*, 17:201 (July 1954). The data can be included, too, in short form on the "main card" or "collection card" if it is desired.

In addition to the minimum essentials defined above, the register may contain detailed descriptions by file container or series; lists of added entries and analytics that can be used for tracing; lists of volumes; and inventories of materials transferred from the collection to other departments of the repository or to other institutions.

The form in which the essential data in a register appears varies in different repositories according to its relationship with other finding aids. As an illustration, institutions which include on the main card the location symbol, title, physical description, dates, and restrictions, but do not include summaries of information on content, often divide their registers into two main sections: (1) a short introduction in which all essential data are included in such form that they can be transferred easily to the entry card sent to the National Union Catalog, and (2) a section containing more detailed descriptions. The register of the William F. Davidson Papers, for example, is arranged in the following form:

- I. Data needed for the Union Catalog. In addition to providing data for the entry, this performs the service of giving the searcher an overview of the contents of a complex collection.
- II. Detailed descriptions.
 - A. An outline of the organization plan for the loose material.
 - B. A container-by-container description of the early correspondence, and a group description of later correspondence, which may be more bulky and less valuable. Included in these descriptions are exact location references to items of particular research importance.
 - C. An outline of the organization plan for the volumes.
 - D. A listing of the volumes.
 - E. A list of all entries which appear in the dictionary catalog.
 - F. A list of maps separated from the manuscripts for cataloging in the map collection.

The Library of Congress has excellent register forms on which the staff records information for its own use and for the convenience

of searchers. They serve also as the basic copy for preparing entries for the National Union Catalog.¹³

The main card prepared for the dictionary catalog commonly appears in one of two forms. The brief form of the main card, which is used when the register includes a summary such as that described for the Davidson Papers, or when a shelf-list card contains summary information, appears as follows:

- A Davidson, William F., 1825-1887.
.D253 Family Papers, 1817-1919.
156 boxes, including 226 vols.
and 340 additional vols.
1,179 linear feet.

The number A .D253 is the location symbol. On the back of the card appear the accession number—which leads to easy determination of donor—and the added entries (a list of authors of manuscripts, subject headings, and analytics).

The more complete main, or collection card, which in itself provides the essential data concerning the collection, follows this form:¹⁴

- Merriam, John Campbell, 1869-1945.
Papers, 1899-1938.
89 ft.
In Library of Congress, Manuscripts Division.
Paleontologist and educator. Correspondence, reports, notes, articles, maps, and other manuscript and printed material, mainly relating to the Carnegie Institution, the National Academy of Sciences, the National Research Council, and national parks.
Unpublished guide in repository.
Open to investigators under Library restrictions.
Gift of the Merriam family, 1951.
1. Carnegie Institution of Washington. 2.
National Academy of Sciences, Washington, D.C.
3. National Research Council.

¹³ Samples are printed in full in Katharine E. Brand's, "The Place of the Register in the Manuscripts Division of the Library of Congress," *American Archivist*, 18:63-67 (January 1955).

¹⁴ The form of entry used as an example is from *Rules for Descriptive Cataloging in the Library of Congress, Manuscripts* (Preliminary Edition, Washington, 1954), 8.

In cataloging single manuscripts, a simple form is ordinarily used for the main cards. The following sample from the Minnesota Historical Society illustrates this type of entry:

CA	Douglas, Stephen Arnold
1857	To Henry Hastings Sibley, St. Paul,
Aug. 15	Minnesota, August 15, 1857.
Res.	2 pp. A.L.S. Reserve item.

Again, on the back of the card, as with every main card, appear the accession number and the list of added entries.

The short register form for the same item reads thus:

CA	Douglas, Stephen Arnold
1857	To Henry Hastings Sibley, St. Paul, Minnesota.
Aug. 15	August 15, 1857.
Res.	2 pp. A.L.S. Reserve item.

A letter written by Stephen A. Douglas, Senator from Illinois, to Henry Hastings Sibley, declining an invitation to speak to the Minnesota Constitutional Convention. Douglas states that he will be in Minnesota on a personal visit only, and does not think it wise for him to speak during the Convention.

1. Douglas, Stephen Arnold, 1813-1861.
1. Sibley, Henry Hastings, 1811-1891.
2. Democratic Party—Minnesota.
3. Minnesota—Politics and Government.
4. Autographs.

For the dictionary catalog, added entries are recorded on the tops of duplicates of the main card. The added entry "Democratic Party—Minnesota," for example, appears in the following form:

	Democratic Party—Minnesota
CA	Douglas, Stephen Arnold
1857	To Henry Hastings Sibley, St. Paul
Aug. 15	Minnesota, August 15, 1857.
Res.	2 pp. A.L.S. Reserve item.

The type of subject heading chosen for added entries is somewhat dependent upon the predominant kind of holdings in the repository

and its specific reference needs. To illustrate, an institution housing manuscripts primarily relating to Virginia would not find the subject heading "Virginia" useful. An institution specializing in Montana manuscripts, however, might find the heading "Virginia" helpful. An institution used extensively for genealogical research will include many more details on family lines in its subject headings than one frequented chiefly by scholars.

In general, the headings should be as specific as it is possible to make them. Searchers and staff alike find it difficult to isolate information when there are in the catalog hundreds of cards grouped under such general subject headings as "Agriculture," "Politics," and "Social Life and Customs."

Guidance in the selection of subject headings is given in *Subject Headings Used in the Dictionary Catalog of the Library of Congress*, and supplements; and in Minnie Earl Sears, ed., *List of Subject Headings for Small Libraries* and the revision of the work by Isabel Stevenson Monro. Headings that are composed within the institutions should be recorded in a manual or card file in order that consistency in form be maintained. Forms of entry for personal names and corporate bodies should be chosen in accordance with the *A.L.A. Cataloging Rules for Author and Title Entries*.

Dates of birth and death should be supplied for authors and for persons whose names appear as added entries, and locations should be entered for organizations. Moderation should be used, however, in the search for the data. If the information is not revealed in easily accessible reference books and records, and if the donor cannot supply it, incomplete entries should be made. The time necessary to trace obscure people and organizations can be used better in other aspects of cataloging.

Author entries are customarily indicated on the lists of added entries in registers and main cards by Roman numerals; subject by Arabic numerals. The author entries may be recorded on the added entry cards in black, and the other added entries in red.

A single manuscript of particular interest located in a collection can be brought out in the catalog by the use of the analytical entry. For example, a letter from William Tecumseh Sherman written to

John Doe, dated March 16, 1863, and located in the John Doe Papers, would be entered thus:¹⁵

Sherman, William Tecumseh, 1820-1891
To John Doe. Lancaster, O., March 16,
1863.
1 1. A.L.S.
(In Doe (John) papers)

After all the cards—main, added entries, and analytics—have been prepared, they are filed in the catalog. Many institutions use a dictionary catalog, which can be defined generally as an arrangement of cards by alphabet.¹⁶ Other types of catalogs that are used in conjunction with the dictionary catalog are autograph catalogs, which list alphabetically the important signatures in all collections and give their locations in the manner of an analytic, and chronological catalogs, which list all documents in all collections by dates. Of course, cards for each special catalog should be planned for when those for the dictionary catalog are being prepared.

Additional tools in common use are individual indices to particularly important collections, and calendars which abstract information contained in each manuscript in a collection. Less emphasis is now placed on calendaring and indexing than in years past. They should not be neglected, however, when the collection warrants the treatment and staff time is available.¹⁷

Attempts have recently been made to establish uniform practices in entering data on all reference tools. Some of the rules that can be adapted for use in most repositories are these:¹⁸

¹⁵ Example from Dorothy V. Martin, "Use of Cataloging Techniques in Work with Records and Manuscripts," *American Archivist*, 18:333 (October 1955).

¹⁶ For information on the technicalities involved in arranging cards in a dictionary catalog, see Margaret Mann, *Introduction to Cataloging and the Classification of Books* (Chicago, 1943), 171-180.

¹⁷ See the bibliography at the end of this bulletin for works on calendaring and indexing.

¹⁸ The rules on title and author entries are drawn in part from *Rules for Descriptive Cataloging in the Library of Congress, Manuscripts. Abbreviations are from the same source and from Morris L. Radoff, "A Guide to Practical Calendaring," American Archivist*, 11:139-140 (April 1948). Those on dating are from Dorothy V. Martin, "Use of Cataloging Techniques in Work with Records and Manuscripts," *American Archivist*, 18:327 (October 1955).

1. The title of a collection is entered first under the name of the family or organization by which the materials were written or to which it was addressed, or under the name of the collector who gathered it.
2. In the second line of the title, the materials are named in as specific terms as possible: "letters" for letters of an individual; "correspondence" for letters between persons or to a person or persons; "records" for organized or miscellaneous materials of organizations; and "papers" for miscellaneous personal and family material. Specify the type of document if only one kind is included: "diary," "minutes of meetings," "letter."
3. If a manuscript or manuscripts are not in original form, the type of copy and the location of the originals should be indicated in the physical description.
4. Quantity or size is indicated for small groups by the number or approximate number of items; for larger collections (occupying more than one linear foot of space, or one or more containers) by the number of containers and volumes, and/or approximate number of items, and/or the number of linear feet of shelf space occupied. Microfilm is measured by the number of reels, or, if less than one full reel, by the number of feet.
5. The statement of dates in the title and on labels for folders and file boxes can be made according to these rules:
 - a. Use day date for anything issued more frequently than monthly, e.g., Jan. 1, 1901—Dec. 31, 1902.
 - b. Use month date for anything issued more frequently than annually, e.g., Jan. 1901—Dec. 1902.
 - c. Annual (calendar year), e.g., 1935
Annual (fiscal year), e.g., 1934/35
 - d. Biennial (calendar year), e.g., 1934-35
Biennial (fiscal year), e.g., 1934/36
 - e. Two annuals issued as combined volumes for two calendar years, e.g., 1934/35
 - f. When a report does not cover the calendar year, make

a note giving terminal date, e.g., "Report year ends June 30."

6. Abbreviations that may be used are these:

born—b.

century—cent.

died—d.

feet—ft.

manuscript—MS.

manuscripts—MSS.

letter—L.

letter signed—L.S.

autograph letter signed—A.L.S.

draft—Df.

document—D.

document signed—D.S.

autograph document signed—A.D.S.

typed letter—T.L.

typed letter signed—T.L.S.

typed draft—T.Df.

typed document—T.D.

typed document signed—T.D.S.

When all the steps described in this bulletin have been taken, the collection is ready for searchers. However, processors rarely feel that the work on any collection is completed. Use of the material may reveal errors in descriptions or catalogs, or indicate the necessity for changes in organization. Research by the staff and scholars who use the papers adds knowledge that may result in new added entries, analytics, and descriptive material. As time becomes available, calendaring and indexing may be undertaken. Time and use enrich the collections and test the validity of the work that has been done.

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stating that he is doing all he can to prejudice the Sioux against the
claims, and that he is tampering with the half breeds for the same purpose.

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Although if any thing could have justified deep and
bitter hostility to him, it would be his treatment of me for the last four
years. What right has he to interfere in these Sioux claims in which
he has no interest. The numerous your interests & mine are identical
and for your sake, to whom he professes friendship, he should rather aid
than endeavor to thwart us. For myself, I expect no favor at his hands.
Nor do I ask any. But you have a right to demand that your interests
should not be prejudiced by his actions. Telegraph me from Galena
when you are coming on. No time should be lost.

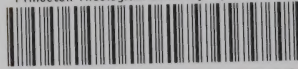
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